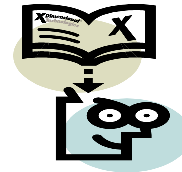


TIPS AND FACTS

Issue 13

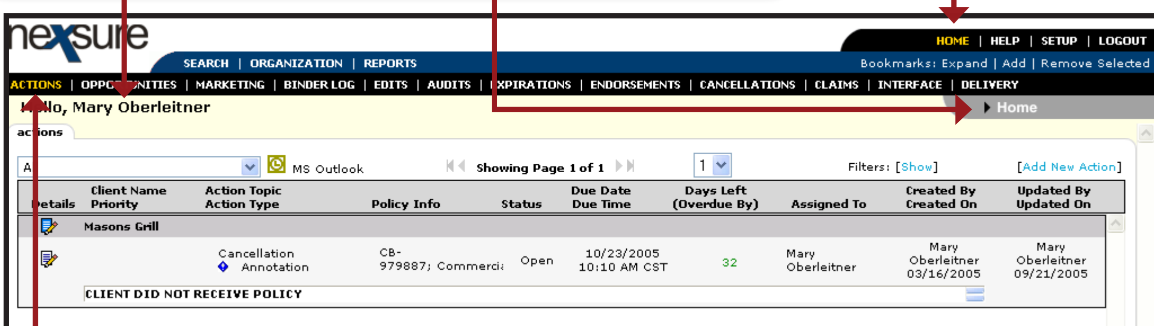
IN THIS ISSUE

- ✖ What Happens on the Home Pages When Servicing Policies

What Happens on the Home Pages When Servicing Policies

Home is accessible from anywhere in Nexsure by clicking the **Home** link on the **Utility menu** in the upper right hand corner of the screen.

The **Home** screens display your name on the left side and the word **'Home'** in the light gray bar to the right.

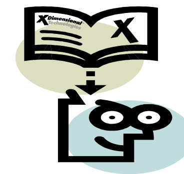


The **Home menu** is the third menu down.

The **Home menu** links can be thought of as a "daily planner" that will allow you to track and monitor pending or submitted work. The **links** act like individual folders that track the agency workflow, under the appropriate link, for all users within the organization.

Nexsure automatically organizes and adds items to the appropriate links on the **Home menu**, based on the type of work done. Items should be left in a pending or submitted status until the corresponding paperwork is received from the carrier. Once the paperwork is received, the applicable item can be accessed from the **Home menu** and then posted. When the item is posted, Nexsure removes it from the **Home menu** automatically. This will assure you that the agency is receiving all the paperwork from their carriers.

nexsure®



TIPS AND FACTS

Home Page Quick Reference

Menu Link	Stage	Status	To Display on Page	To Remove from Page
Actions	Any	Open	Actions are displayed on the **Home**-**Actions** screen in a summary view on the designated due date. Actions that are due or over due remain on the **Home**-**Actions** page.	Close the Action. *Note: Closed Actions may be viewed by using the **[Show]** filter and selecting a status of closed as needed.*
Action Description: An Action is a follow-up, created by you or through the Servicing process, which allows the user to manually follow-up on a designated date.				
Opportunities	Opportunity	Any	Add an Opportunity by clicking the **Opportunities** link on the Client menu and clicking the **Add New Opportunity** link. Select the line(s) of business and add.	➢ Move the Opportunity to Marketing by clicking the **Market** link on the Opportunity detail screen. ➢ Remove by clicking the remove icon on Opportunity summary view.
Opportunity Description: An Opportunity is a pre-marketing tool that allows a suspect to be “pre-qualified” for the Marketing stage.				
Marketing	Marketing	Any Marketing Status	Add a Marketing submission by accessing **Servicing** and selecting **Marketing**, either new or existing business.	➢ Place new submissions in force by clicking the **in force** link or Renew an expiring policy and select the market submission to replace the expiring policy. ➢ Move marketing submissions to history by clicking on the **History** link on the detail screen or click the remove icon from the Marketing summary screen. *Once all submissions are moved from the Marketing summary view, they will no longer appear on the Home-Marketing page.*
Marketing Description: Application(s) added to Marketing for new business or re-marketing.				

nexsure®

Tips and Facts

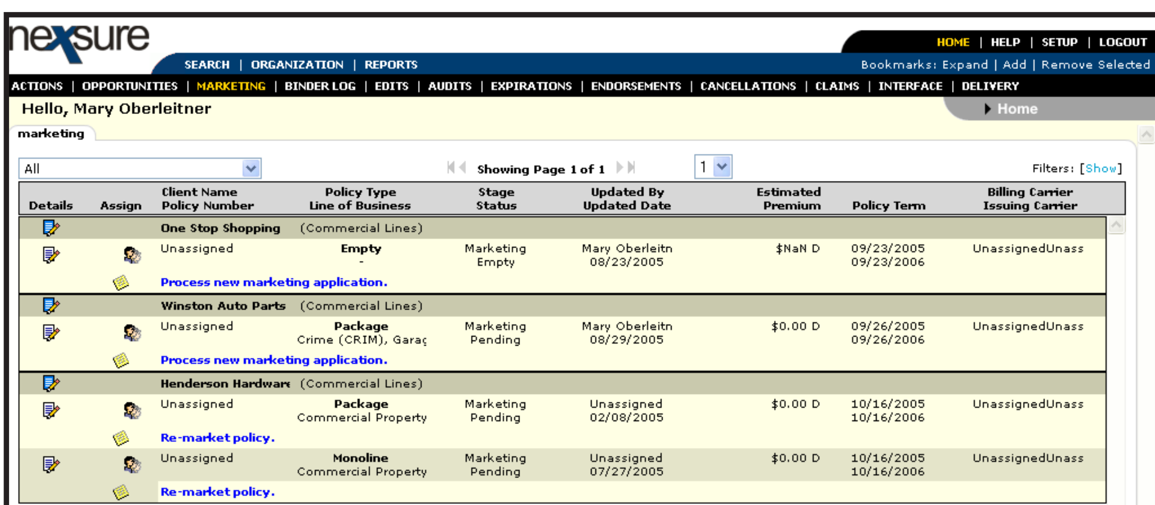
Menu Link	Stage	Status	To Display on Page	To Remove from Page
Binder Log	In Force Future Endorsement	Binder with an Open Status	Add a Binder by accessing Servicing and selecting Binder, then choosing policy. Any Open Binder status.	➢ Abort or removing the Binder ➢ Close the Binder
Binder Log Description: Open Binders create the Binder Log for tracking purposes.				
Edits	Policy Pol. History	Pending	Add an Edit by accessing **Servicing** and selecting **Edit** then choose the policy. Any Edit Pending status displays on the Home-Edits page.	➢ Abort the Edit ➢ Post the Edit
Edits Description: Modifications to the policy that does not require communication to the carrier.				
Audits	Policy Pol. History	Pending	Add an Audit by accessing **Servicing** and selecting **Audit**, then choose the policy. Any Audit Pending status is displayed on the Home-Audits page.	➢ Abort the Audit ➢ Post the Audit
Audits Description: Policy premium Audit has been received or agency may use to wait for the audit to come in from the carrier.				
Expirations	Policy	In force Received Future Expired Bound Reinstated Rewritten Submitted Pending-Cancellation	Policies on the Clients In Force list that have not been renewed are displayed on the Home-Expiration page.	➢ Renewing the policy ➢ Moving the policy to history
Expirations Description: Expiring policy list.				
Endorsements	Policy	Submitted 2nd Request 3rd Request Received	Add an Endorsement by accessing **Servicing** and selecting **Endorse** then choosing the policy. Any Endorsement Pending status appears on the Home-Endorsements page.	➢ Abort the Endorsement ➢ Post the Endorsement
Endorsements Description: Policy changes requested by the client.				

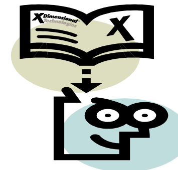
TIPS AND FACTS

Menu Link	Stage	Status	To Display on Page	To Remove from Page
Cancellations	Policy	Pending	Add a Cancellation by accessing **Servicing** and selecting **Cancel** then choose the policy. Any Cancellation Pending status displays on the Home-Cancellations page.	➢ Abort the Cancellation ➢ Post the Cancellation
Cancellations Description: Pending Cancellations waiting for finalization.				
Claims	Policy Pol. History	Open	Add a Claim by accessing **Servicing** and selecting **Claims** and line of business, then select policy. Any Claim Pending status displays on the Home-Claims page.	➢ Abort the Claim ➢ Close the Claim
Claims Description: Open claims.				

Note: The defaults in the Show filters determine what is displayed in the summary view when clicking a link on the Home Menu.

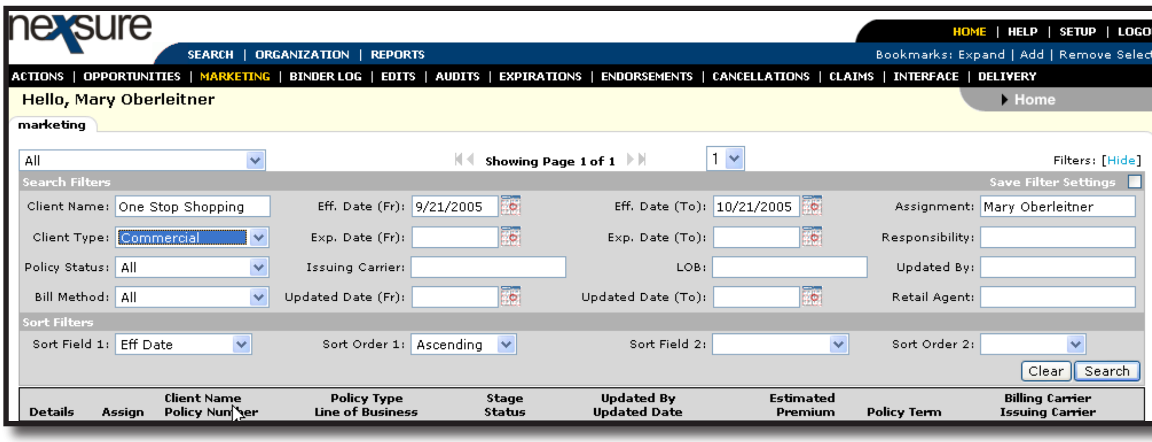
Each link on the **Home menu** will have its own **[Show]** filter with different defaults automatically setup for each link. The defaults contained in the search filter determine what is displayed when clicking a link on the **Home menu**. The search results can be modified by clicking the **[Show]** link to open the search filter.



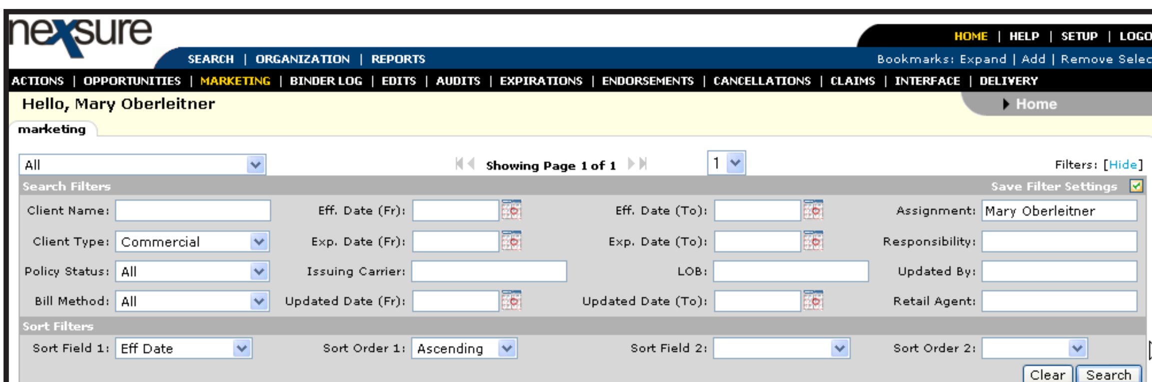


Tips and Facts

Multiple fields can be used to filter the search. Each field selected requires a minimum of two characters to activate a valid search. Sort fields are also provided to enable the user the ability to sort in either ascending or descending order. Enter the search criteria desired and click the **Search** button, the returned results will fall within the search criteria entered.



The Search filter for each link on the Home menu can be saved to your specifications. Click the **[Show]** filter link, enter the desired default values and click the **Save Filter Settings** check box to save the settings. The next time you click that link on the Home menu, the summary view will default to the search criteria you have saved.



Note: Using the Save Filter Settings check box provides you with your own customized page default. Keep in mind that any dates or data entered will limit the default view until modified.